Chapter 2 – Passenger Demand Estimates and Allocation

Chapter Overview

An important part of this Air Passenger Demand Study is an estimate of demand for commercial air service in the State of Idaho. Every part of the State has some level of demand for airline travel. This demand will obviously be higher in larger cities and business and tourism centers than in small towns and rural areas. Nonetheless, it is important for each airport and for the State as a whole to understand the level of demand that is associated with each county.

This section of the study includes estimates of originating commercial passenger demand for each county in Idaho. In addition, each airport's capture rate of county demand was computed. From these capture rates and survey efforts from Chapter 1, it is possible to determine the actual market area for each airport. Also considered in this study are three out-of-state commercial service airports in Missoula, Salt Lake City, and Spokane. The purpose of including these airports is to estimate the number of Idaho-generated passengers that seek flights from competing airports in neighboring states. This study also provided a means for estimating commercial passengers from nearby states who drive to an Idaho airport to initiate their commercial airline travel.

This chapter includes a discussion of the statistical model that was constructed to estimate and predict airport usage patterns for Idaho's air travelers. The methodology behind the model is presented, and the results are included on an airport-by-airport basis. For each study airport, a determination of the counties in the airport's market area, the capture rate of passengers in those counties, and a comparison of the airport's actual market area with its theoretical service area are all provided in the next chapter of the report.

Methodology

The method used to estimate passenger demand is a widely-accepted statistical model called the Gravity Model. Essentially, this model assumes that each airport has a specific "gravity" that attracts passengers. Idaho's airports each have different characteristics in terms of daily departures, non-stop destinations served, number of carrier choices, average fares, and so on. The Gravity Model attempts to account for these differences mathematically while simultaneously accounting for the effects of travel time. For example, in Idaho, Boise Air Terminal is an extremely attractive choice for many residents since it has a large number of carriers serving a variety of destinations with lower fares than most other airports in the State. Conversely, Joslin Field/Magic Valley Regional Airport (Twin Falls) is more limited in its offerings to travelers since it is served by only one airline providing flights to only one destination. Based on their preferences, passengers who live relatively close to Twin Falls may in fact choose to begin travel from Boise even though the distance they must first drive to get to the airport is greater. The Gravity Model applied in this case would attempt to assign the relative probability of the average passenger within each county selecting each of Idaho's airports. The county-level passenger origination estimates that result

from this model are compared to other data (such as the parking lot inventories, passenger surveys, and travel agent surveys presented in Chapter 1) to correct for any statistical discrepancies. These surveys were used to calibrate the model in order to generate more accurate estimates of air travel demand. The various study surveys also show the relative distribution of commercial demand throughout the State.

The data needed for the Gravity Model were obtained from a variety of sources. Employment data for each county was obtained from the Bureau of Labor Statistics. County population data were obtained from the U.S. Census Bureau. Departures, carriers, departing seats, and equipment types were obtained from *Official Airline Guide.* Originations and fares were obtained from O&D Plus, a database product from BACK Aviation Solutions. Originations by county were estimated by determining the ratio of statewide originations to socioeconomic and demographic data presented in Chapter 1. For instance, a mathematical calculation was performed to determine the average number of airline flights each Idaho resident took in 2001. Similar calculations were made on the basis of employees, households, and per capita income in each county. Employment and population are generally highly correlated with growth in and demand for air service.

The final originations-per-county estimates were made from a mixture of these methods: Idaho's largest counties (Ada, Bonneville, and Canyon) all experience higher rates of air service consumption than other counties in the State and therefore required special estimation procedures. Similarly, because of high tourism rates, Blaine and Kootenai counties both have higher levels of demand for commercial airline travel than their population and employment levels might otherwise predict.

Statewide Findings

Table 2-1 shows total originations for each county in Idaho for 2001, as determined by the Gravity Model. As might be expected, Idaho's more urbanized or tourist-dependent counties account for the majority of the State's originating commercial airline travelers. Ada, Bannock, Blaine, Canyon, Kootenai, and Twin Falls counties account for over 1.34 million of the State's 1.94 million originations, or about 70 percent of the total. Camas and Clark counties have the fewest originations, with each adding about 1,100 origination commercial airline passengers to the State's total.

Table 2-1

Originations by County, 2001

County	Originations	County	Originations
Ada	605,183	Gem	17,853
Adams	3,835	Gooding	15,727
Bannock	82,842	Idaho	17,611
Bear Lake	6,912	Jefferson	20,832
Benewah	10,124	Jerome	20,213
Bingham	45,592	Kootenai	120,344
Blaine	109,033	Latah	38,053
Boise	8,661	Lemhi	15,811
Bonner	40,657	Lewis	4,072
Bonneville	90,325	Lincoln	4,497
Boundary	10,858	Madison	30,349
Butte	3,193	Minidoka	21,959
Camas	1,100	Nez Perce	40,938
Canyon	265,130	Oneida	4,508
Caribou	7,980	Owyhee	12,069
Cassia	23,570	Payette	23,594
Clark	1,127	Power	8,639
Clearwater	9,787	Shoshone	15,181
Custer	4,798	Teton	6,596
Elmore	47,919	Twin Falls	71,681
Franklin	12,353	Valley	10,494
Fremont	13,032	Washington	12,148
Total Idaho Generated Originations			*1,937,180*
Source: Wilbur Smith Associates			

The data in **Table 2-2** shows the number of passenger originations (enplanements) at each of Idaho's airports, as reported in the U.S. Department of Transportation's *O&D Survey*. The total number of originations at Idaho's airports in 2001 was 1,584,380. With the aid of the Gravity Model, the number of originations attracted from neighboring states or diverted to nearby competing airports can be estimated. The results are shown in **Table 2-3**.

Boise Air Terminal was able to attract almost 78,900 originating passengers from outside Idaho (primarily Oregon). Lewiston/Nez Perce County and Pullman-Moscow Regional airports were able to attract another 7,000 passengers from Washington. (For the purposes of this study, attraction from "out-of-state locations" to Lewiston/Nez Perce County and Pullman-Moscow Regional airports was defined as passengers the airports won from other nearby airport market areas, regardless of location. For example, passengers from Clarkston, WA using Lewiston's airport were not included in the airport's attraction figures, as these passengers are using their "home" airport. Similarly, passengers from Pullman, WA using Pullman-Moscow Regional would not be counted as attraction, even though those passengers are from non-Idaho locations.)

Table 2-2

Idaho Airport Originating Passengers, 2001

Airport	Originations
Boise Air Terminal/Gowen Field	1,240,080
Idaho Falls Regional	118,090
Lewiston/Nez Perce County	61,024
Pocatello Regional	45,152
Pullman-Moscow Regional	28,128
Friedman Memorial (Sun Valley)	59,073
Joslin Field/Magic Valley Regional (Twin Falls)	32,833
Idaho Airport Originating Passengers	*1,584,380*

Source: US DOT, *O&D Survey*

Table 2-3

Idaho Passenger Attraction and Diversion, 2001

Attracted Originations		Diverted Originations	
Boise Air Terminal	78,872	Missoula International	-15,466
Lewiston/Nez Perce County	3,078	Salt Lake City International	-208,848
Pullman-Moscow Regional	3,892	Spokane International	-214,328
Total Attraction	*85,842*	*Total Diversion*	*-438,642*

Source: Wilbur Smith Associates

In 2001, Idaho lost an estimated 438,000 originations to airports in neighboring states. Salt Lake City and Spokane each attracted similar numbers of Idaho-generated originations; both airports attracted over 200,000 originations from areas in Idaho. Missoula attracted a comparatively small number of passengers from Idaho as well. **Table 2-4** shows the final accounting for these categories of originations.

Table 2-4

Originations, Diversion, and Attraction, 2001

	Originations
Idaho Airport Originating Passengers *(Table 2-2)*	1,584,380
plus: Diverted Originations *(Table 2-3)*	438,642
less: Attracted Originations *(Table 2-3)*	-85,842
equals: Total Idaho Generated Originations (Table 2-1)	*1,937,180*

Source: Wilbur Smith Associates

One benefit of the Gravity Model is that it allows for an estimation of each airport's market area. The remainder of this chapter is devoted to allocating the demand in each county to each airport. Once passenger originations for each county are assigned to an airport (or several airports, in some cases), a map of each airport's actual market area can be created. Further, the market areas determined by the model can be compared to theoretical service areas for each airport. In

general, a commercial airport can expect a passenger to drive up to an hour to board a flight. As is the case in other western states, Idaho residents have somewhat different perceptions of distance, so for larger commercial services airports a larger service area can be assumed. The comparison between actual market areas and theoretical service areas is especially useful to smaller airports that have higher levels of passenger diversion. With market-specific information in hand, those airports can pursue strategies to make themselves more attractive to passengers using competing airports. The remainder of this chapter discusses air passenger demand on an airport-by-airport basis.

Airport Findings – In-State Airports

The following sections profile each Idaho airport in terms of current demand. The demand discussion includes the number of originations attracted from each county in the airport's actual market area; in addition, the capture rate for each county (that is, the percent of each county's total air service demand that an individual airport serves) is presented. Finally, a comparison of each airport's actual market area and its theoretical market area is included in the next chapter of the report.

Boise Air Terminal/Gowen Field

Demand from three counties along the I-84 corridor through Boise, along with nearby areas in Oregon, make up almost 985,000 of Boise Air Terminal's 1.24 million originations. Boise has the largest market area of any Idaho airport, covering 27 counties or about 65 percent of the State. According to study findings, the market area for Boise Air Terminal contains most of the Snake River plain, and stretches from as far north as Nez Perce County south and east to the Utah and Wyoming borders. In terms of county capture rates, Boise Air Terminal serves as much as 99-100 percent of the passenger originations from counties around and north of the city. **Table 2-5** lists the counties in Boise Air Terminal's market area, the number of originations from each county, and the proportion of each county's market that Boise Air Terminal serves. **Figure 2-1** shows a map of Boise's airport market data.

Table 2-5

Originations and Capture Rate

Boise Air Terminal/Gowen Field

County	Originations	Capture of County
Ada	596,719	99%
Adams	3,659	95%
Bannock	20,921	25%
Bingham	3,004	7%
Blaine	37,535	34%
Boise	8,661	100%
Bonneville	13,378	15%
Camas	595	54%
Canyon	261,855	99%
Cassia	4,746	20%
Custer	2,516	52%
Elmore	47,432	99%
Gem	17,853	100%
Gooding	10,828	69%
Idaho	4,589	26%
Jefferson	2,277	11%
Jerome	12,363	61%
Lincoln	1,384	31%
Madison	6,490	21%
Minidoka	10,215	47%
Nez Perce	1,075	3%
Owyhee	10,619	88%
Payette	21,008	89%
Teton	398	6%
Twin Falls	41,001	57%
Valley	9,316	89%
Washington	10,770	89%
Other States	78,872	
Total	*1,240,080*	

Source: Wilbur Smith Associates

FIGURE 2-1
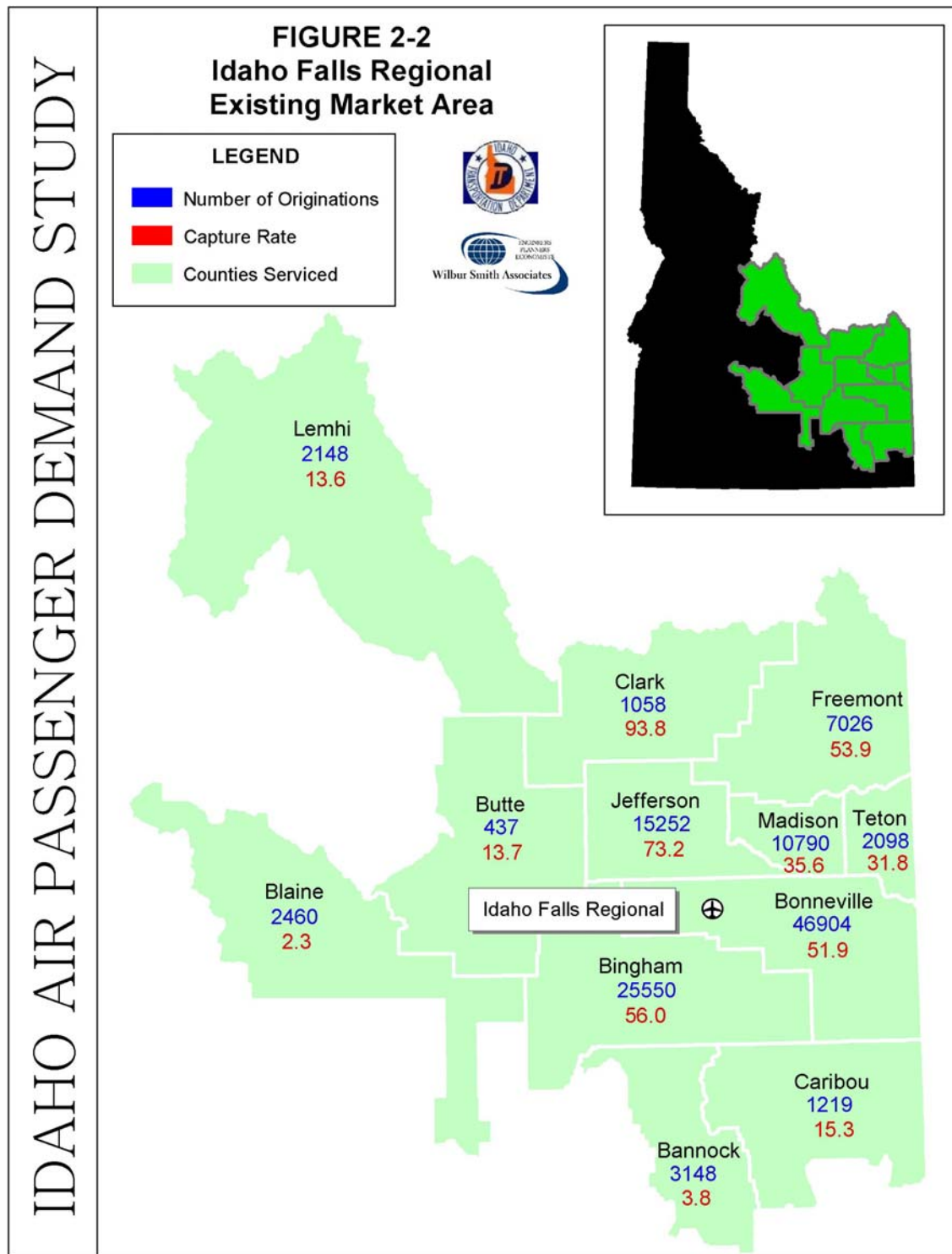Boise Air Terminal - Gowen Field
Existing Market Area
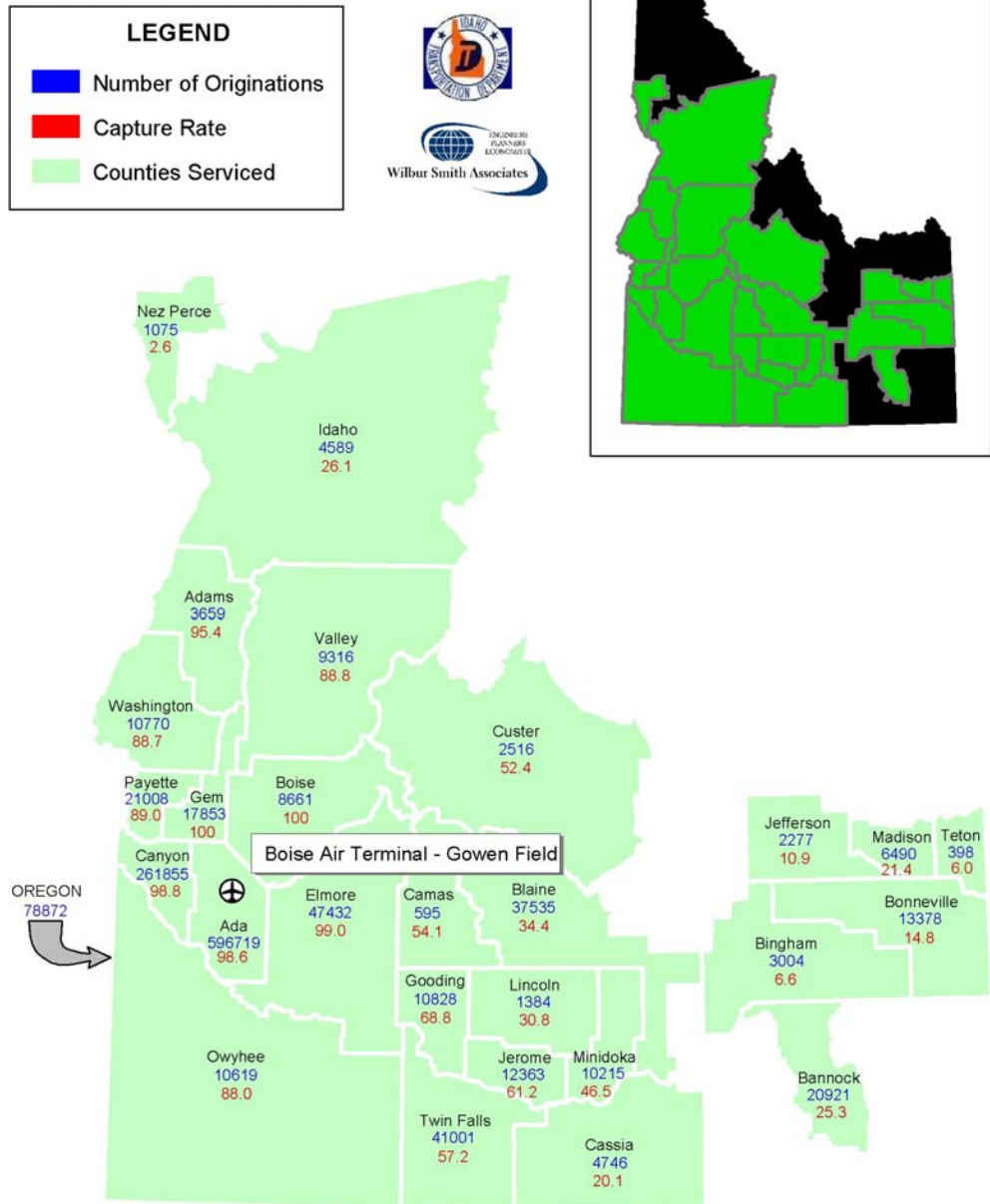
Idaho Falls Regional Airport

The concentration of population between Idaho Falls and Pocatello along Interstate 15 is where Idaho Falls Regional draws most of its passenger originations. Over 60 percent of all originations served at Idaho Falls Regional in 2001 came from Bingham and Bonneville counties. Another 22 percent came from Jefferson and Madison counties. The airport's market area is comprised of twelve counties, stretching from Clark County to the north to Bannock County in the south, and from Blaine County in the west to the Wyoming border. The airport captures about half of the passenger originations from the highly populated counties around the airport. Much of the demand from Idaho Falls Regional's market area is captured by Salt Lake City International. **Table 2-6** details Idaho Falls Regional's market information, and **Figure 2-2** shows this information graphically.

Table 2-6
Originations and Capture Rate
Idaho Falls Regional

County	Originations	Capture of County
Bannock	3,148	4%
Bingham	25,550	56%
Blaine	2,460	2%
Bonneville	46,904	52%
Butte	437	14%
Caribou	1,219	15%
Clark	1,058	94%
Fremont	7,026	54%
Jefferson	15,252	73%
Lemhi	2,148	14%
Madison	10,790	36%
Teton	2,098	32%
Total	*118,090*	

Source: Wilbur Smith Associates

FIGURE 2-2
Idaho Falls Regional
Existing Market Area

LEGEND

Number of Originations

Capture Rate

Counties Serviced

Wilbur Smith Associates

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Lemhi
2148
13.6

Clark
1058
93.8

Freemont
7026
53.9

Butte
437
13.7

Jefferson
15252
73.2

Madison
10790
35.6

Teton
2098
31.8

Blaine
2460
2.3

Idaho Falls Regional

Bonneville
46904
51.9

Bingham
25550
56.0

Caribou
1219
15.3

Bannock
3148
3.8

Lewiston/Nez Perce County Airport

Lewiston/Nez Perce County's market area consists of seven counties in Idaho and areas in the State of Washington. More than half of the airport's originations come from Nez Perce County. The airport does succeed in capturing a significant portion of the originating passengers in Nez Perce County and points south in Lewis and Idaho counties. Additionally, the airport served slightly more than 3,000 passengers from nearby Washington. The passengers that were attracted from Washington are those that come from areas that would be expected to fall in another airport's market area. For instance, passengers from Clarkston, WA and similar nearby areas were not included in the airport's attraction figure. The total number of passengers that come to Lewiston's airport is certainly larger than 3,000, but not all of these passengers can logically be considered as "attracted" passengers.

The airport's ability to expand its base and rate of passenger capture is influenced by its relatively close location to Pullman-Moscow Regional and Spokane International airports.   Lewiston/Nez Perce County Airport's location near these other airports impacts its ability to capture demand for air service in counties north of Lewiston. This airport's market area extends from Benewah County south to Idaho County, and as far east as parts of Clearwater County and west into Washington. **Table 2-7** shows the county demand characteristics for Lewiston/Nez Perce County Airport. **Figure 2-3** shows these data graphically.

Table 2-7
Originations and Capture Rate
Lewiston/Nez Perce County

County	Originations	Capture of County
Adams	176	5%
Benewah	1,162	11%
Clearwater	2,751	28%
Idaho	7,635	43%
Latah	9,982	26%
Lewis	2,754	68%
Nez Perce	33,486	82%
Other States	3,078	
Total	*61,024*	

Source: Wilbur Smith Associates

FIGURE 2-3
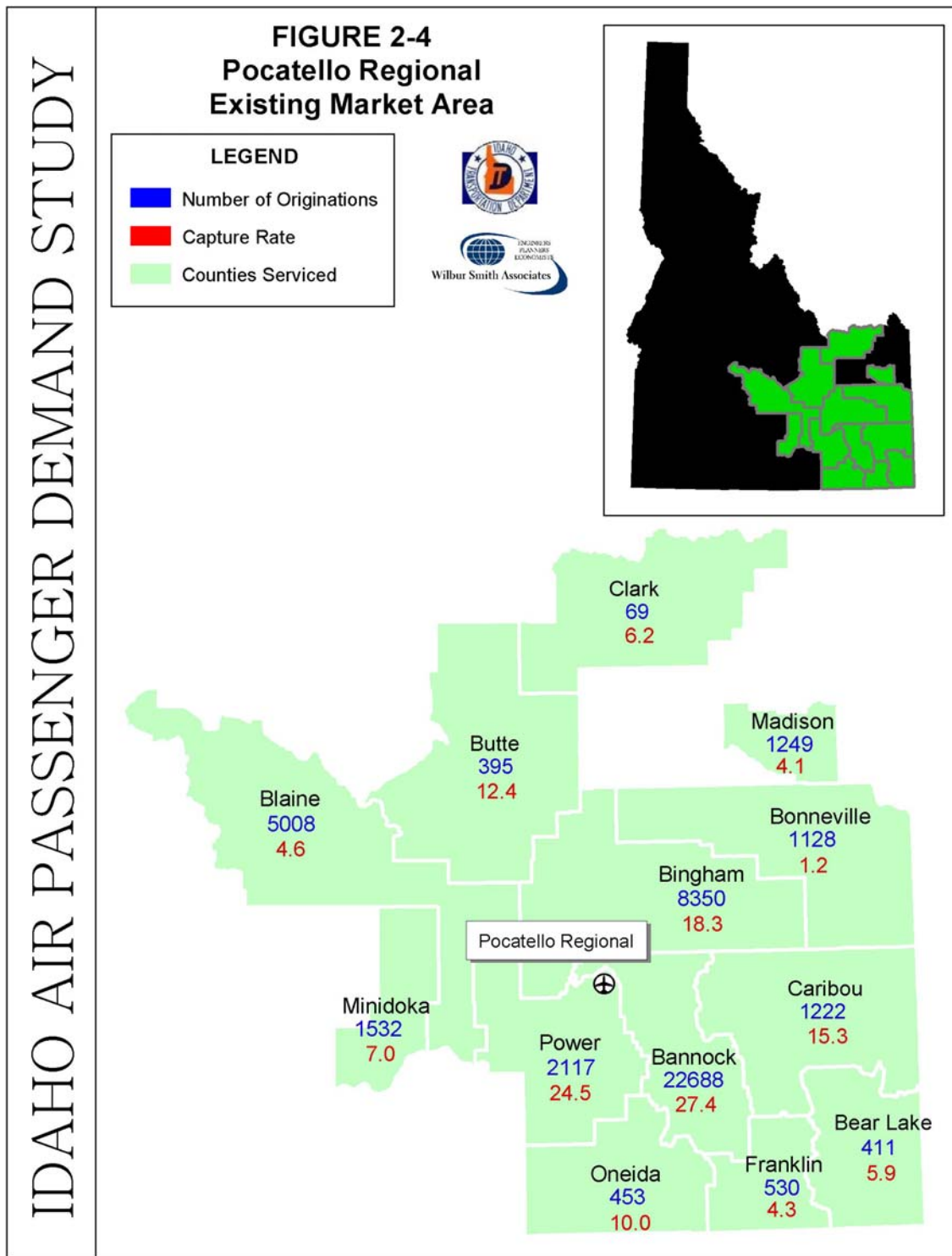Lewiston - Nez Perce County
Existing Market Area
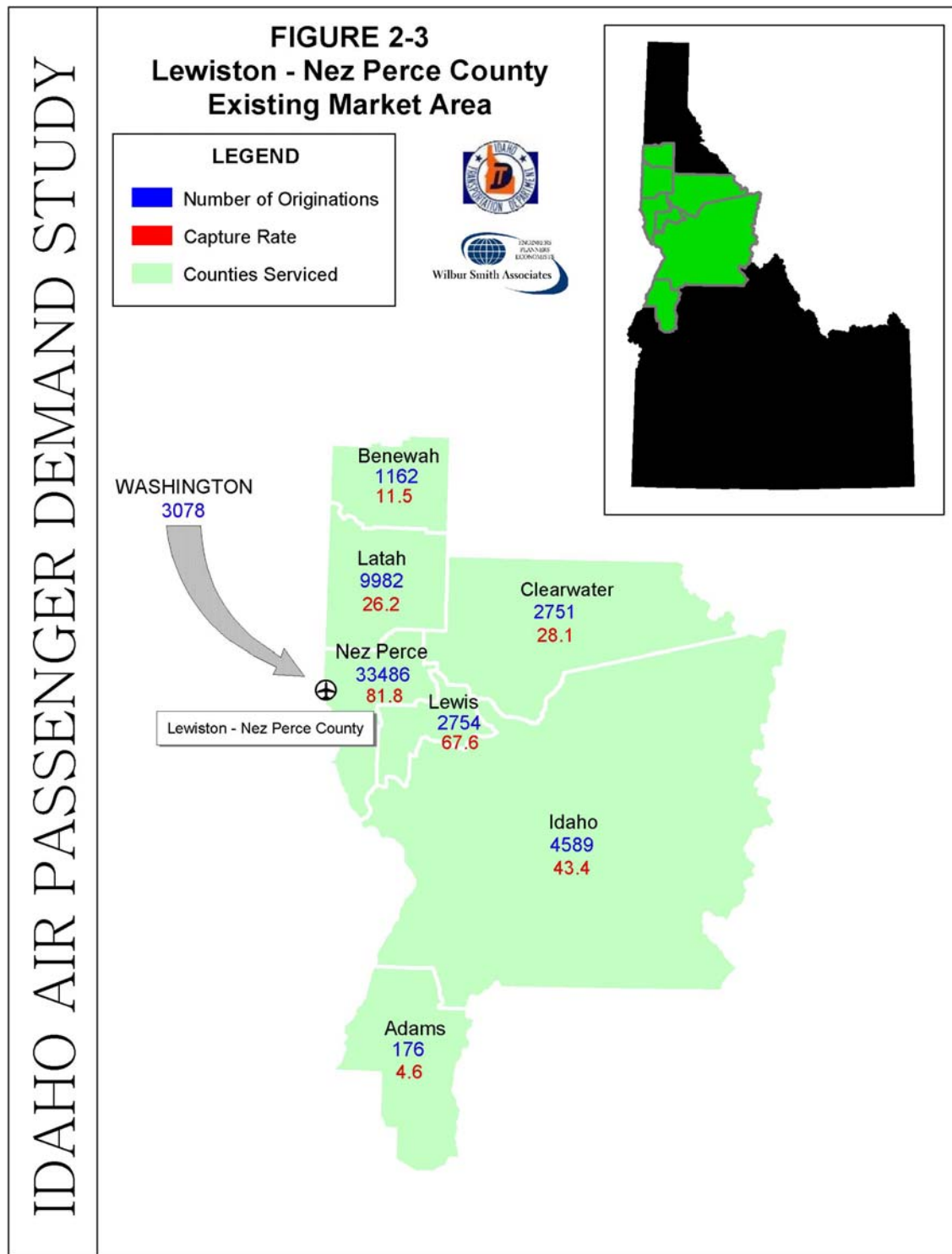
Pocatello Regional Airport

Pocatello Regional Airport's market area is comprised of 13 counties in southeastern Idaho. The market area stretches from Minidoka County east to the Wyoming border and from Butte County south to the Utah border. The airport captured less than one-quarter of the demand in any of the counties in its actual market area. About half of the airport's originations are from its home county, Bannock. Another 20 percent came from Bingham County, where it competes with Idaho Falls' airport to capture originating passengers. **Table 2-8** shows the market data for Pocatello Regional, and **Figure 2-4** depicts this information graphically.

Table 2-8

Originations and Capture Rate

Pocatello Regional

County	Originations	Capture of County
Bannock	22,688	27%
Bear Lake	411	6%
Bingham	8,350	18%
Blaine	5,008	5%
Bonneville	1,128	1%
Butte	395	12%
Caribou	1,222	15%
Clark	69	6%
Franklin	530	4%
Madison	1,249	4%
Minidoka	1,532	7%
Oneida	453	10%
Power	2,117	25%
Total	*45,152*	

Source: Wilbur Smith Associates

FIGURE 2-4
Pocatello Regional
Existing Market Area

LEGEND
Number of Originations
Capture Rate
Counties Serviced

Pullman-Moscow Regional Airport

Pullman-Moscow Regional's market area in Idaho includes six counties and parts of Washington State. Due to the airport's location in Washington, its inclusion in this document presents some challenges in estimating the airport's ability to capture demand in Idaho. For this reason, it must be noted that the capture rate in Latah County is somewhat overstated and the capture rate for "Other States" somewhat understated, since the airport was technically included in Idaho for this report. However, the physical size and the concentration of the airport's market area can still be analyzed. It is accurate to say that the airport's demand is concentrated in Latah County in Idaho and in southeastern parts of Whitman County in Washington. The airport's ability to capture demand outside of these areas drops sharply, due mainly to the airport's proximity to Spokane and Lewiston. The airport captures less than ten percent of the passenger originations in the counties north or south of Latah County. The market data for Pullman-Moscow Regional Airport is shown in **Table 2-9** and **Figure 2-5**.

Table 2-9
Originations and Capture Rate
Pullman-Moscow Regional

County	Originations	Capture of County
Benewah	972	10%
Clearwater	987	10%
Idaho	743	4%
Latah	18,617	49%
Lewis	313	8%
Nez Perce	2,604	6%
Other States	3,892	
Total	*28,128*	

Source: Wilbur Smith Associates

FIGURE 2-5
Pullman/Moscow Regional
Existing Market Area
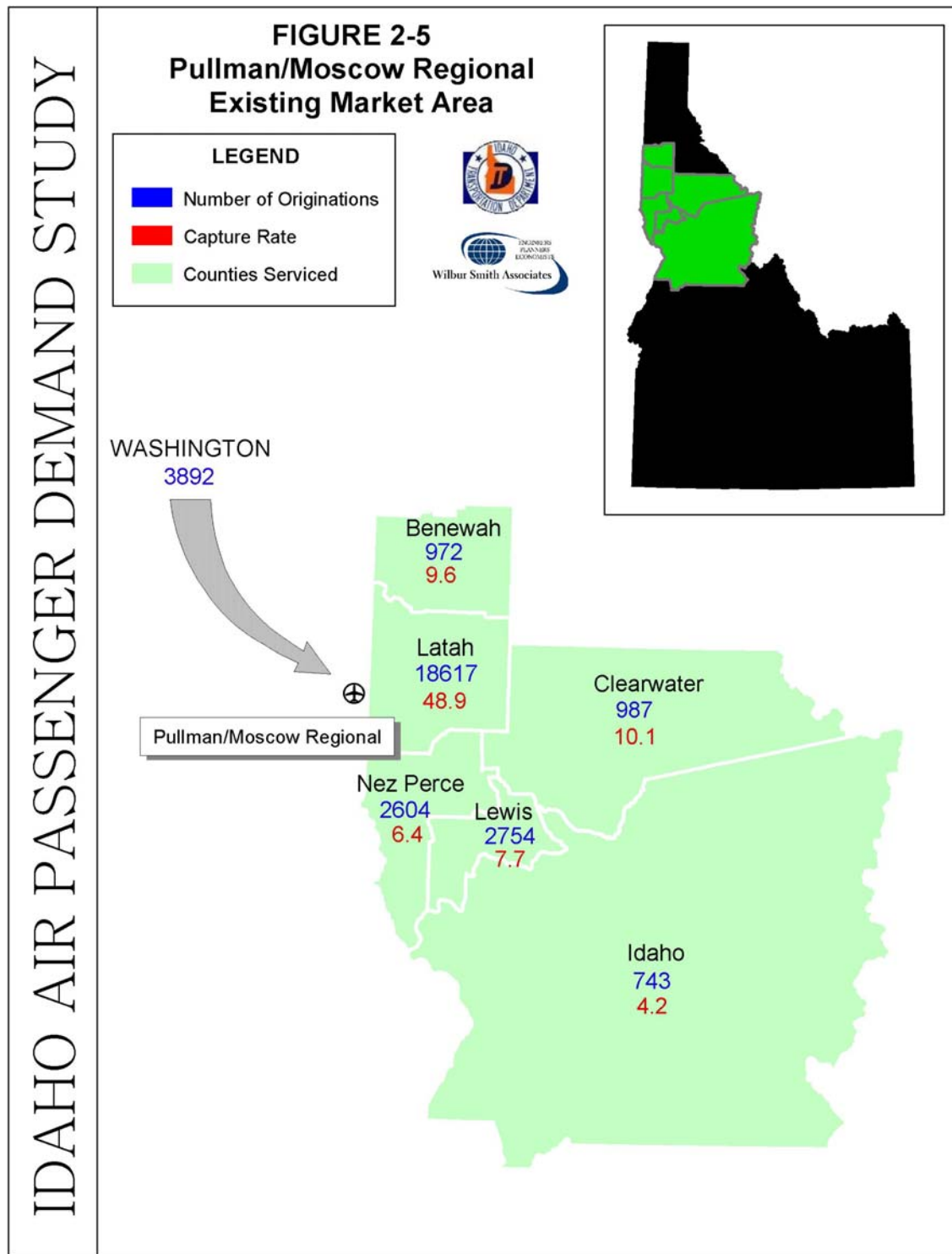
Friedman Memorial Airport (Sun Valley)

The market area for the airport serving Sun Valley consists of seven counties and is concentrated in Blaine County. This county generates over 80 percent of the airport's passenger originations. The market area for this airport spans Idaho from the Montana border in Lemhi County south to Lincoln County and from Camas County east to Butte County. The airport's market area is mostly made up of high sagebrush steppe or mountain wilderness and contains a relatively small population. However, recreational opportunities abound in the market area for this airport, and this fact results in high demand for commercial airline travel. The airport's market data is shown in **Table 2-10**, and a map of its market area appears in **Figure 2-6**.

Table 2-10
Originations and Capture Rate
Friedman Memorial (Sun Valley)

County	Originations	Capture of County
Blaine	48,103	44%
Butte	1,751	55%
Camas	505	46%
Custer	2,205	46%
Gooding	1,097	7%
Lemhi	3,824	24%
Lincoln	1,588	35%
Total	*59,073*	

Source: Wilbur Smith Associates

FIGURE 2-6
Friedman Memorial (Sun Valley)
Existing Market Area
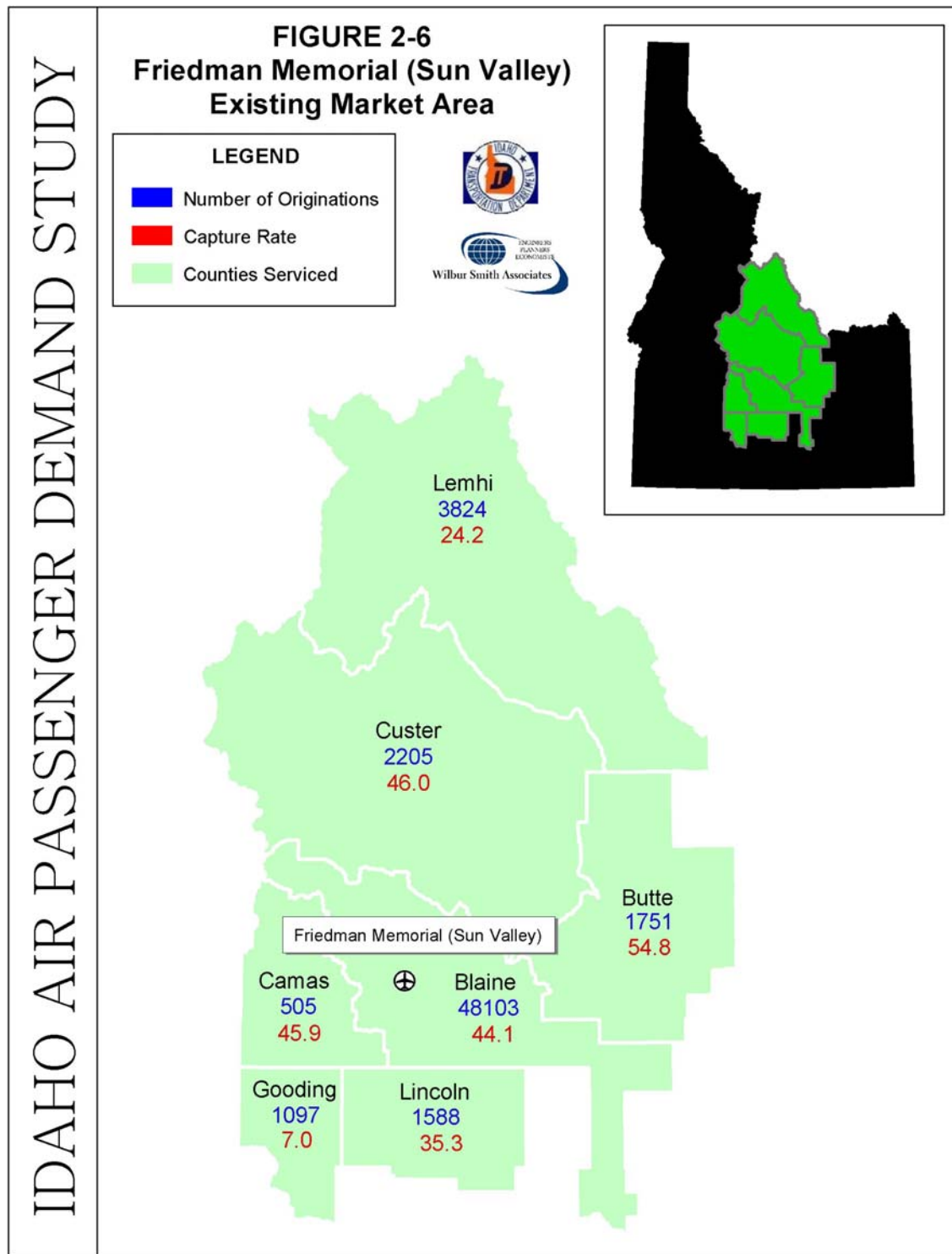
Joslin Field/Magic Valley Regional Airport (Twin Falls)

Joslin Field/Magic Valley Regional Airport's market data is shown in **Table 2-11**. The airport's market area is comprised of eight counties, and the airport captures no more than one-quarter of the originating commercial airline travelers in any of those counties. In the airport's home county of Twin Falls, only one out of six originating passengers uses the local airport. The airport is impacted by its proximity to both Boise and Salt Lake City. In fact, in Twin Falls County, the local airport captures about 18 percent of all air service demand, while Boise Air Terminal captures 57 percent and Salt Lake City attracts the remaining 25 percent. The physical size of the market area stretches from Gooding County east to Minidoka County and from Blaine County south to the Utah/Nevada border. **Figure 2-7** shows the airport's market area.

Table 2-11

Originations and Capture Rate

Joslin Field/Magic Valley (Twin Falls)

County	Originations	Capture of County
Blaine	6,443	6%
Cassia	3,549	15%
Custer	77	2%
Gooding	2,577	16%
Jerome	4,756	24%
Lincoln	1,030	23%
Minidoka	1,560	7%
Twin Falls	12,841	18%
Total	*32,833*	

Source: Wilbur Smith Associates

FIGURE 2-7
Joslin Field-Magic Valley Regional
Existing Market Area

LEGEND
Number of Originations
Capture Rate
Counties Serviced

Custer
77
1.6

Blaine
6443
5.9

Gooding
2577
16.4

Lincoln
1030
22.9

Minidoka
1560
7.1

Jerome
4756
23.5

Joslin Field - Magic Valley
Regional (Twin Falls)

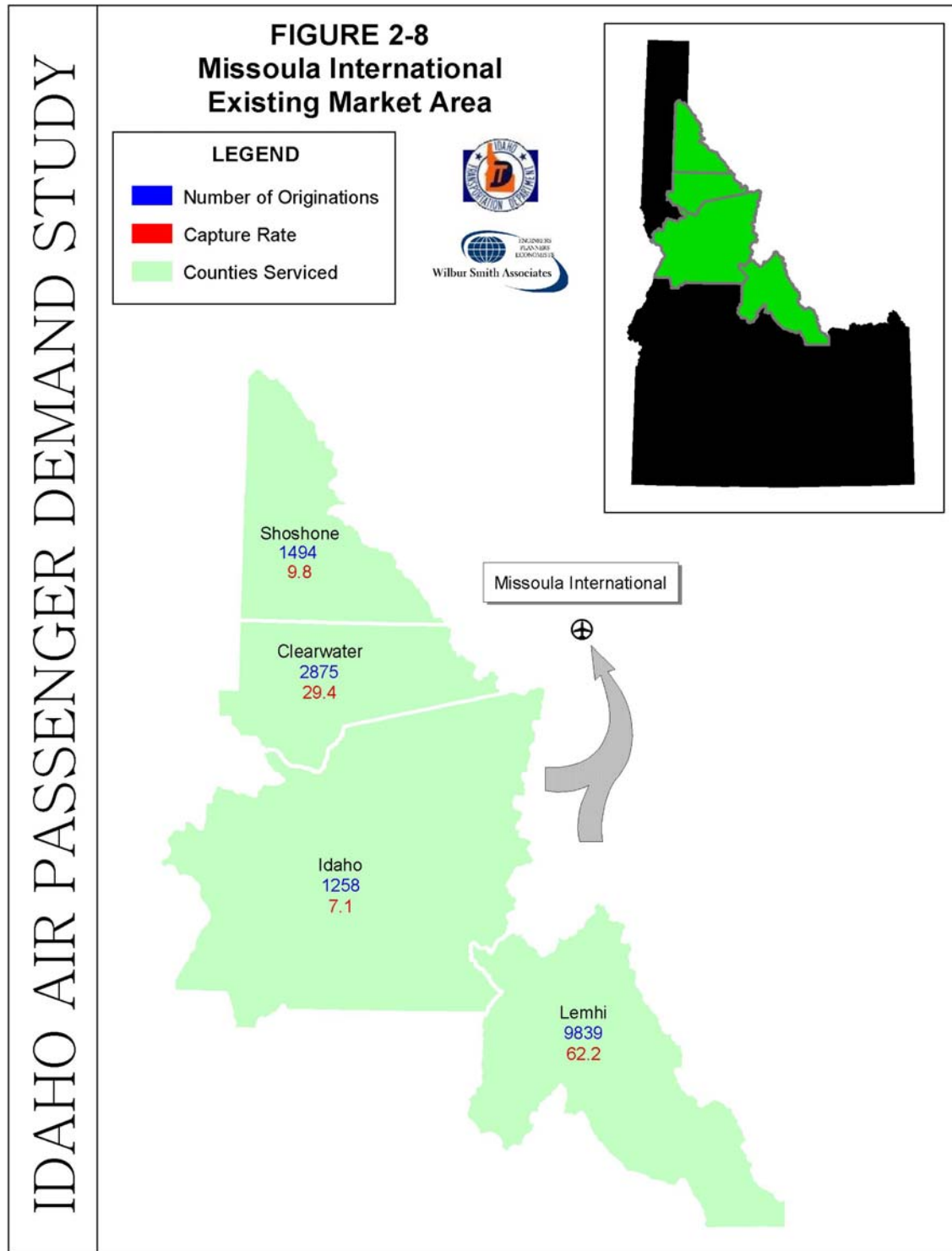Twin Falls
12841
17.9

Cassia
3549
15.1
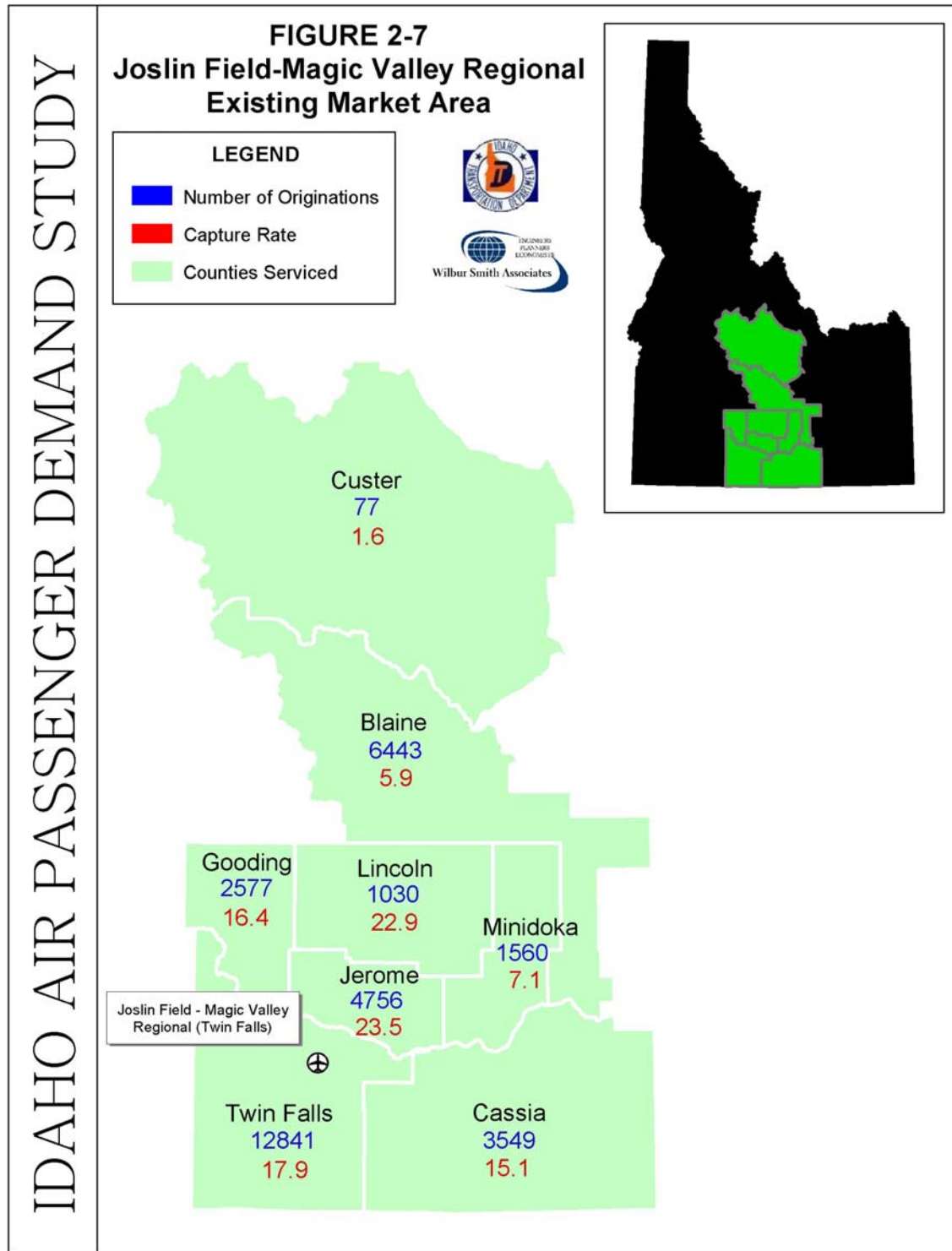
Airport Findings – Out-of-State Airports

Missoula International Airport

Missoula International attracts a small number of Idaho's passenger originations. Four counties in northern Idaho that share a border with Montana contributed almost 15,500 originations to Missoula International Airport's enplanements in 2002. Nearly 9,900 of these passengers came from Lemhi County, directly south of Missoula. Clearwater, Idaho, and Shoshone counties each have a closer or lower-cost alternative airport at Lewiston/Nez Perce County, Pullman-Moscow Regional-Moscow, or Spokane. The 15,466 passengers that Missoula International attracted from Idaho make up less than one-tenth of one percent of Idaho-generated originations and about 3.5 percent of in-state originations diverted to out-of-state airports. **Table 2-12** depicts Missoula's market in Idaho, and **Figure 2-8** shows a map of the same data.

Table 2-12
Originations and Capture Rate
Missoula International

County	Originations	Capture of County
Clearwater	2,875	29%
Idaho	1,258	7%
Lemhi	9,839	62%
Shoshone	1,494	10%
Idaho Total	*15,466*	

Source: Wilbur Smith Associates

FIGURE 2-8
Missoula International
Existing Market Area

LEGEND
Number of Originations
Capture Rate
Counties Serviced

Shoshone
1494
9.8

Clearwater
2875
29.4

Idaho
1258
7.1

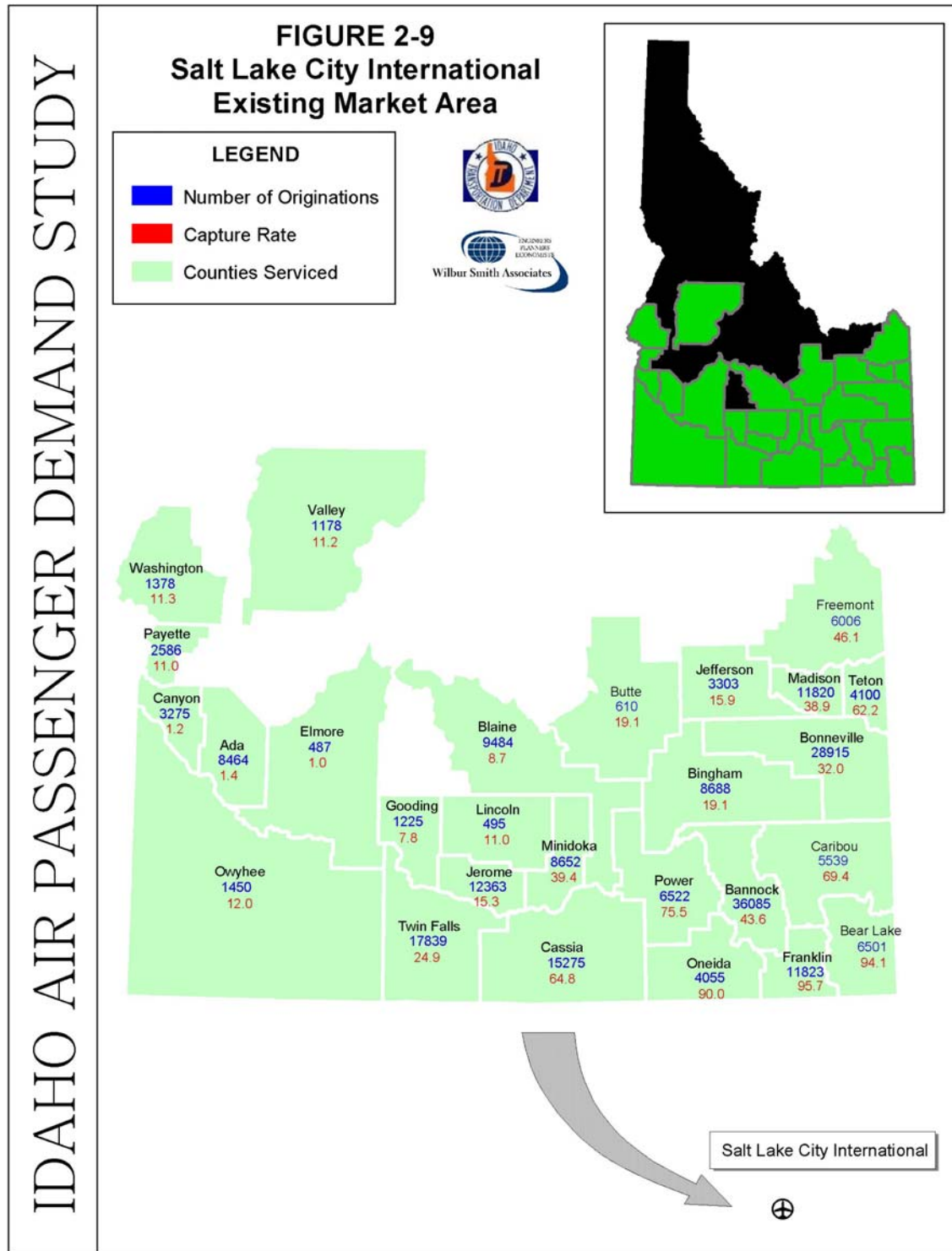Missoula International

Lemhi
9839
62.2

Salt Lake City International Airport

An extensive choice of carriers and destinations coupled with relatively low prices at Salt Lake City International combined to divert about 208,000 of Idaho's originating commercial airline tavelers. Salt Lake City International attracted passengers from 27 of Idaho's 44 counties. The majority of Salt Lake City's attracted Idaho originations came from population centers in the eastern part of the State. Bannock County (Pocatello), Bonneville County (Idaho Falls), Madison County (Rexburg) and Twin Falls County together contributed over 94,600 originations, or about 45 percent of all diversions to Salt Lake City. **Table 2-13** and **Figure 2-9** show the details of Salt Lake City's capture of Idaho passenger originations.

Table 2-13

Originations and Capture Rate

Salt Lake City International

County	Originations	Capture of County
Ada	8,464	1%
Bannock	36,085	44%
Bear Lake	6,501	94%
Bingham	8,688	19%
Blaine	9,484	9%
Bonneville	28,915	32%
Butte	610	19%
Canyon	3,275	1%
Caribou	5,539	69%
Cassia	15,275	65%
Elmore	487	1%
Franklin	11,823	96%
Fremont	6,006	46%
Gooding	1,225	8%
Jefferson	3,303	16%
Jerome	3,094	15%
Lincoln	495	11%
Madison	11,820	39%
Minidoka	8,652	39%
Oneida	4,055	90%
Owyhee	1,450	12%
Payette	2,586	11%
Power	6,522	75%
Teton	4,100	62%
Twin Falls	17,839	25%
Valley	1,178	11%
Washington	1,378	11%
Idaho Total	*208,848*	

Source: Wilbur Smith Associates

FIGURE 2-9
Salt Lake City International
Existing Market Area

LEGEND
Number of Originations
Capture Rate
Counties Serviced

Salt Lake City International
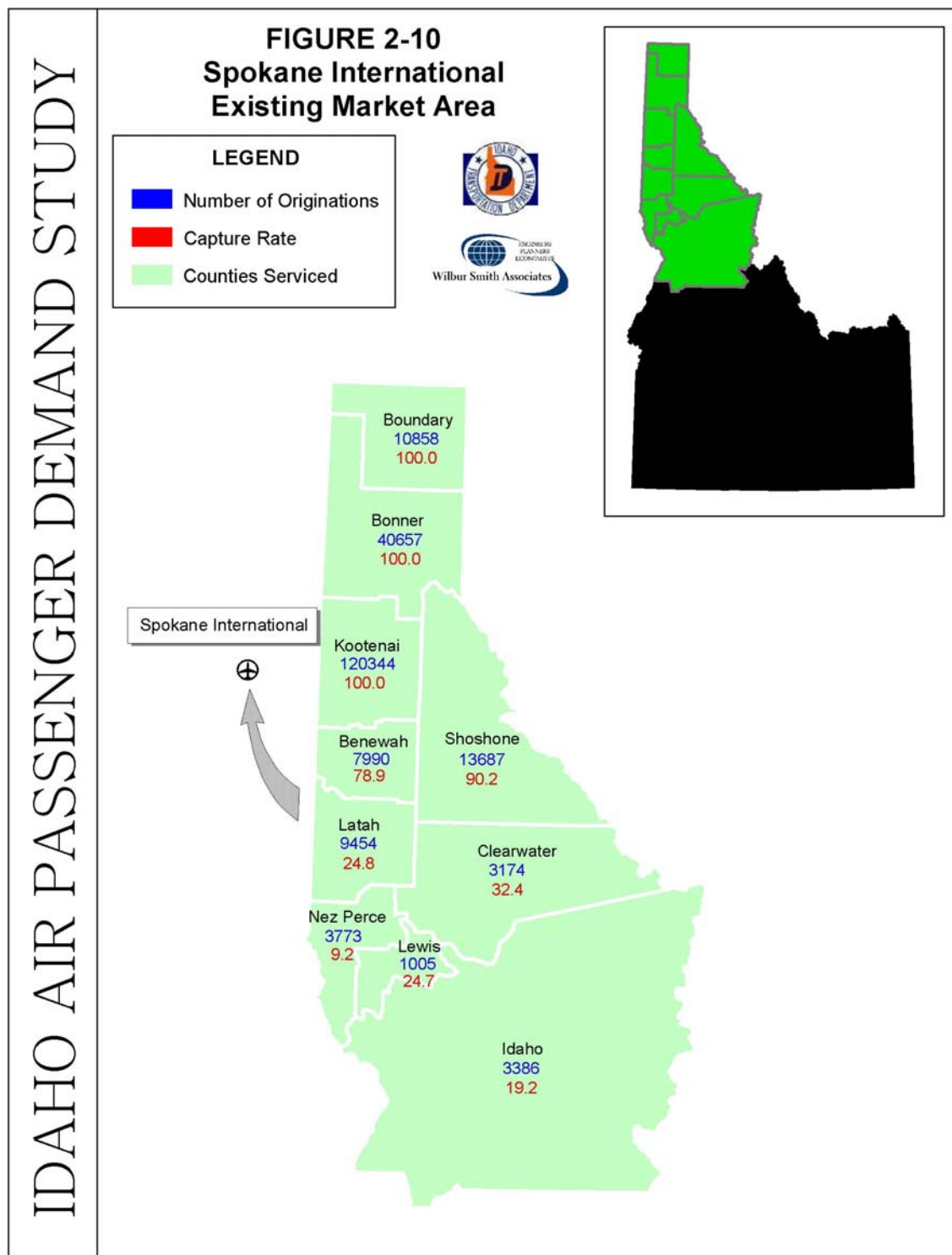
IDAHO AIR PASSENGER DEMAND STUDY

Spokane International Airport

Spokane International is often perceived as being a convenient, low-cost choice for Northern Idaho's commercial air service customers. The commercial airport alternatives for Idaho passengers in this area are at Pullman-Moscow Regional and Lewiston/Nez Perce County. Both of these airports are about an hour south of northern Idaho's population centers. As a result, Spokane International attracted over 214,000 passenger originations from Idaho in 2002. This represents about 49 percent of all diverted Idaho-generated originations and about 11 percent of all Idaho commercial passenger originations. The majority of Spokane's Idaho demand comes from Kootenai County, the location of Coeur d'Alene. Bonner and Boundary counties account for another 51,000 originations. These three counties are home to many resort and outdoor activities, as well as some of Spokane's suburbs. Additionally, Spokane attracted 90 percent of Shoshone County's air service demand, with the remainder going to Missoula International. As noted in the discussions regarding Lewiston/Nez Perce County and Pullman-Moscow Regional-Moscow, Spokane captures much of the commercial air service demand near these airports. **Table 2-14** and **Figure 2-10** show details regarding Spokane International's Idaho passenger attraction.

Table 2-14
Originations and Capture Rate
Spokane International

County	Originations	Capture of County
Benewah	7,990	79%
Bonner	40,657	100%
Boundary	10,858	100%
Clearwater	3,174	32%
Idaho	3,386	19%
Kootenai	120,344	100%
Latah	9,454	25%
Lewis	1,005	25%
Nez Perce	3,773	9%
Shoshone	13,687	90%
Idaho Total	*214,328*	

Source: Wilbur Smith Associates

FIGURE 2-10
Spokane International
Existing Market Area

LEGEND
■ Number of Originations
■ Capture Rate
■ Counties Serviced

Boundary
10858
100.0

Bonner
40657
100.0

Spokane International
⊕

Kootenai
120344
100.0

Benewah
7990
78.9

Shoshone
13687
90.2

Latah
9454
24.8

Clearwater
3174
32.4

Nez Perce
3773
9.2

Lewis
1005
24.7

Idaho
3386
19.2

IDAHO AIR PASSENGER DEMAND STUDY

Chapter Conclusions

Commercial airline travelers originating in Idaho's populated southern counties find a relatively large number of alternatives for air service. Boise Air Terminal represents the most attractive alternative among Idaho's airports, with a low-fare airline and many carrier and destination choices. Idaho's other commercial airports have more limited service. Airports in nearby states often offer more choices to Idaho's air travelers; this results in the diversion of some of Idaho's passenger originations to airports in neighboring states.

About 22 percent of the passenger originations generated in Idaho (both residents and visitors) boards flights at out-of-state airports. These diverted travelers are split between Salt Lake City and Spokane, with a small percentage also going to Missoula to begin air travel. The remaining Idaho originations, about 1.58 million, select in-state airports. The majority of all Idaho generated passenger originations use Boise Air Terminal. Boise's airport served about 1.16 million Idaho-generated originations in 2002; the airport's market area covers roughly two-thirds of the State's land area. The six other commercial service airports in Idaho compete for about 250,000 air passengers. Few originations in Idaho's northern and extreme southeastern areas are served by in-state airports, with those originations seeking air service opportunities at Salt Lake City or Spokane.

Historically, each of Idaho's commercial airports has recorded its number of commercial passenger enplanements. This number, however, does not in every instance speak to the total number of originating passengers (both residents and visitors) that are associated with the airport's market area. This portion of the Idaho Air Passenger Demand Study provides each commercial airport in Idaho with important information. This information can be used by each airport to make informed decisions on its potential for sustaining and improving commercial airline service.

As part of this chapter Idaho's commercial airports and the Idaho Transportation Department have information on the following:

- Total number of annual commercial airline originations, by county and for the State as a whole. This number represents airline trips attributed to both residents of and visitors to each county.

- Patterns of passenger diversion among Idaho airports. Many of Idaho's originating passengers leave their local airport market area to begin their commercial airline trip from a more distant airport, primarily Boise Air Terminal.

- Geographic extent of each airport's market area. All of Idaho's commercial airports serve multi-county market areas, but few of the airports are able to attract large percentages of the total number of passenger originations that are associated with the counties in its identified market area.

- Some counties have higher propensities to generate passenger originations. Counties with higher levels of population, employment and/or tourism tend to generate higher per capita volumes of commercial passenger originations.

- A few Idaho airports attract passenger originations from neighboring states. Most notably, Boise Air Terminal and the airport serving Lewiston attract small percentages of their total originating passengers from nearby states.

- A notable percentage, twenty-two, of Idaho's originating passengers leave the State to begin their commercial airline travel. While Missoula International attracts some Idaho generated commercial passenger originations, the airport's serving Salt Lake and Spokane each attract a more significant and relatively equal percent of Idaho's passenger originations.

Information presented in this chapter helps each airport to identify its existing market area. Data presented in this chapter helps each airport to better understand both its in-state and its out-of-state competitors. Finally, with market area data and passenger originations by county, each airport has a better estimate of total demand for commercial airline travel in its specific market area. Given competition form both in-state and out-of-state airports, it is not likely that most airports being analyzed in this study will every capture 100 percent of the passenger originations associated with its market area. With this information, however, Idaho airports included in this study have better information on estimates of passenger diversion. In addition, areas of Idaho currently without commercial airline service have estimates of the annual volume of air travel demand that is associated with their part of the State. All of this information is important to making informed decisions on commercial air service initiatives on the local level.